SignUpPal

Event/Course Management & Attendance System

User Manual

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2 Introduction

What is SignUpPal?

SignUpPal is a **web-based** Event/Course Management & Attendance System that facilitates sign up and taking attendance of events/courses.

For each event, an administrator will create the event in the system and assign the organizers for the event. The organizers will log into the event to configure the event, add invitees and broadcast email invitations to the invitees. On receiving the invitation, invitees can go online and RSVP for the event. Events can also be set to open for registration by the public. The organizers will approve RSVPs and registrations. On the day of the event, organizer can sign in to take attendance for each session of the event. Attendance reports can then be generated.

SignUpPal Features

- Event/Course listing
- User friendly and easy to use
- User can sign up for events/courses
- Support multiple sessions per event/course
- Limit the number of attendee per session
- Invitees can RSVP online
- Organizer can import invitees list and send email invitations
- On-site attendance taking
- Print/export details of events
- Event reports generation
- iPad supported

Minimum System Requirements

Hardware:

- Computer that can run Windows XP and above smoothly.
- Super VGA (800 x 600) or higher-resolution video adapter and monitor

Browsers supported:

- Microsoft Internet Explorer 8 and above
- Apple Safari 5 and above

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3 Setting Up SignUpPal

The steps to setup SignUpPal is as follows:

- Change organization information
- Add event types
- Add invitee types
- Configure email settings
- Configure SMS settings
- Configure the logo image
- Edit the terms & conditions text
- Add users

The above tasks are done by the administrator.

Change Organization Information

To change your organization information

- Sign into your account as an administrator
- Click the **License** tab
- Change your organization information
- Click **Save**

Add Event Types

You can add the types of event that your company organizes. For examples: excursion, seminar, workshop etc.

To add an event type:

- Sign into your account as an administrator
- Click the **Settings** tab
- Click **Event Types**
- Click **New**
- Enter the name of the event type
- Click **Save**

Add Invitee Types

You can add the types of invitees that your organization invites to events. For example: parents, VIP, guest etc.

To add an invitee type:

- Sign into your account as an administrator
- Click the **Settings** tab
- Click **Event Types**
- Click **New**
- Enter the name of the resource type
- Click **Save**

Configure Email Settings

To configure the email account for sending email:

- Sign into your account as a administrator
- Click the **Settings** tab
- Click **SMTP Server**
- Enter the email server and account information

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- Click **Save**

Configure SMS Settings

SignUpPal can send SMS via SMSProdigy.net service.

To configure the **SMSProdigy.net** account for sending SMS:

- Sign into your account as a administrator
- Click the **Settings** tab
- Click **SMS**
- Configure the SMS options and **SMSProdigy,net** account information
- Click **Save**

Customize the Logo Image

You can configure the logo displayed on the web pages.

- Sign into your account as an administrator
- Click the **Settings** tab
- Click **Logo**
- Click **Browse** to select the image on your computer you want to use.
- Click **Open**.
- Click **Change**

Edit the Terms & Conditions Text

You can edit the terms & conditions that your user has to agreed to when they sign up for an event.

- Sign into your account as an administrator
- Click the **Settings** tab
- Click **Terms & Conditions**
- Enter the text.
- Click **Save**.

Add User

SignUpPal supports 3 user account types:

- **Administrator** who can perform all tasks
- **Organizers** are people who configure and manage events.
- **Invitees** are people who will be invited to events or has registered for events.

To add a user:

- Sign into your account as an administrator
- Click the **Users** tab
- Click **New**
- Enter the user information
- Click **Save**.
- Click **Send Account Info** beside the user to send the account information to the user

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4 General Tasks

Viewing Upcoming Events

To view upcoming events:

- Go to you SignUpPal account URL at **<account_name>.signuppal.net**.
- The list of upcoming events will be displayed.

Signing In to Your Account

To sign into your SignUpPal account:

- Go to the sign in page of your SignUpPal account at **<account_name>.signuppal.net**.
- Click **Sign In**
- Sign in with your ID and password
- If you forgot your password, click the **Retrieve Password** link and enter your email address. Your account information will be sent to your email address.

5 Administrator Tasks

Create a New Event

New events have to be created by administrator who will assign the organizers to manage the event.

To create a new event:

- Sign into your account as an administrator
- Click **Events** to show the **Events page**
- Click **New**
- Enter the event information
- Click **Save**

The event URL will be created.

An event can be for invitees only (people that will be invited), or for any other registered users (all invitees in the system), or also for new users (new registrations).

You can enter a survey URL for your invitees to go to take a survey during or after the event.

Assign Event Organizers

After creating an event, the administrator will assign the organizer(s) who will manage the event. Administrators can manage any event. Organizers can only manage events that they are assigned.

To assign an organizer to an event:

- Sign into your account as an administrator
- Click **Events** to show the list of events
- Click **Edit** beside the event you want to assign organizers
- In the **Event page**, click **Organizers**
- Click **New**
- Select the organizer to add to the event
- **Save**

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6 Organizer Tasks

Configure an Event

To configure an event:

- Sign into your account as an organizer
- Click **Events** to show the list of events
- Click **Edit** beside the event you want to configure
- Configure the event's general information
- Configure the event's content
- Configure the event's sessions
- Add event's invitees

Configure an Event's General Information

The following event's general information can be set:

Item	Description
Event Name	The name of the event.
Excerpt	The excerpt of the event.
Venue	The venue of the event.
Event Type	The type of event.
Start Date	The start date of the event.
End Date	The end date of the event.
Allowable Users	**Invitees** – only invited users can RSVP **Other Registered Users** – only users in the system can register for the event **New Users** – anyone can register for the event
Active state	**Yes** – Publish the event **No** – Do not publish the event
Event URL	This is the auto-generated event URL.
Survey URL	If the survey URL is set, a Survey button will be displayed on the event page. Clicking the Survey button will open the URL specified.

Configure an Event's Content

The following event's content can be set:

Item	Description
Event Page Content	This is the content of the event.
RSVP Page Content	This is the content of the RSVP page.
RSVP Thank You Page Content	This is the content of the RSVP Thank You Page that user will see upon RSVP.
Email Invitation Content	This is the content of the event invitation email.
Email Confirmation Content	This is the content of the event sign up confirmation email.
Email Rejection Content	This is the content of the event sign up rejection email.
SMS Invitation Content	This is the content of the event invitation SMS.
SMS Confirmation Content	This is the content of the event sign up confirmation SMS.
SMS Rejection Content	This is the content of the event sign up rejection SMS.
SMS Reminder Content	This is the content of the event reminder SMS.

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Adding Event Sessions

Each event must contain 1 or more sessions.

For each session, you can set the following:

- Session Name
- Session Description
- Maximum number of users
- Date
- Start Time
- End Time

To add a session to an event:

- Sign into your account as an organizer
- Click **Events** to show the list of events
- Click **Edit** beside the event you want to configure
- Click **Sessions**
- Click **New**
- Enter the session information
- Click **Save**

Add Invitees to an Event

For each event, you can add existing or new invitees to invite.

To add existing invitees to an event:

- Sign into your account as an organizer
- Click **Events** to show the list of events
- Click **Edit** beside the event you want to configure
- Click **Invitees**
- Click **Add**
- Select the existing invitees to add
- Click **Save**

To add a new invitee to an event:

- Sign into your account as an organizer
- Click **Events** to show the list of events
- Click **Edit** beside the event you want to configure
- Click **Invitees**
- Click **New**
- Enter the new invitee information
- Click **Save**

Import Invitees to an Event

To import an invitee list to an event:

- Sign into your account as an organizer
- Click **Events** to show the list of events
- Click **Edit** beside the event you want to configure
- Click **Invitees**
- Click **Import**
- Select the type of invitee to import
- Browse for the CSV file containing the invitee list
- Click **Import**

Existing invitees will be skipped during import.

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Send Email Invitations to Event Invitees

To send email invitation to invitees that they can perform RSVP:

- Sign into your account as an organizer
- Click **Events** to show the list of events
- Click **Edit** beside the event you want to configure
- Click **Invitees**
- Select the invitees you want to send email invitations
- Click **Send Invitation**

The invitees will receive an email with a link to the event RSVP page.

Approve/Reject Event RSVPs and Registrations

When an invitee accept an invitation or when there is a new user sign up for the event, the invitee or new user will be listed in the **Event Registration** page for approval or rejection.

To approve/reject event RSVP or registration:

- Sign into your account as an organizer
- Click **Events** to show the list of events
- Click **Edit** beside the event you want to configure
- Click **Registrations**
- Select the invitees you want to approve or reject
- Click **Approve** or **Reject**

Upon approval or rejection, an email will be sent to the invitee/user.

Taking Event Attendance

On the day of the event, the organizer will be able to take attendance for each session of the event.

To take event session attendance:

- Sign into your account as an organizer
- Click **Events** to show the list of events
- Click **Edit** beside the event you want to configure
- Click **Attendance**
- Select the session to take attendance
- Select the invitees to take attendance
- Click **Sign In** or **Sign Out**

Generating Event Reports

To generate an event report:

- Sign into your account as an organizer
- Click **Reports**
- Select the event type
- Select the event
- Select the invitee type
- Click **Generate Report**

If you need a specific customized report, please contact us at sales@aquariussoft.com.

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7 Invitee Tasks

RSVP an Event Invitation

Invited users of an event will get an email with the link to RSVP.

To accept/reject the invitation:

- Click on the link of the invitation email
- Click **Attending** to accept the invitation
- Click **Not Attending** to reject the invitation

Sign Up for an Event for Existing Users

For an existing user to sign up an uninvited event:

- Go to the home page
- Select the event to sign up
- Click **Existing User**
- Log in using User ID and Password
- Select the sessions to attend
- Click **Next**
- Click **Finish**

8 New User Tasks

Sign Up for an Event for New Users

For an existing user to sign up an uninvited event:

- Go to the home page
- Select the event to sign up
- Click **New Users**
- Enter user information
- Select the sessions to attend
- Click **Next**
- Click **Finish**

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